



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Lauren Herzog Trust

Barron, Richard B. (for Perine & Dicken Professional Fiduciaries and Conservators)

Case No. 09CEPR00542

Petition for Approval of Trustee's Supplemental Current, for Approval of Trustee's Fees and for Authorization to Compensate Counsel for the Trustee and for Final Distribution of Trust Assets

		PERINE & DICKEN PROFESSIONAL FIDUCIARIES , Co-Trustees Ronald Dicken, Patricia Dicken, and Karen Steele, are Petitioners.	NEEDS/PROBLEMS/ COMMENTS: <u>Note:</u> On 9/16/14, the Court settled the Trustee's Fourth Account covering through 4/30/14, and also authorized termination of the trust, with supplemental account. Order Authorizing Termination of Trust was entered 9/17/14.
		Petitioners state: On 9/17/14, the Court allowed Lauren to terminate the trust and the trustee was directed to assign to Lauren future rights in the annuities held by the trust and to retain a reserve of \$5,000.00 for final debts, taxes, and administrative costs and to provide an informal accounting on or before 3/24/15. The Trustee has now paid all remaining bills except for attorney's fees for this report and account and have distributed all assets of the trust save and except for \$3,529.23.	
	Aff.Sub.Wit.		1. Need receipt from the beneficiary Lauren Herzog of distributions totaling \$429,746.88. 2. The Order Settling the Fourth Account entered 9/17/14 authorized attorney fees of \$2,052.00, as requested in the petition. However, the Disbursements Schedule reflects "Court approved attorney fees" of \$6,143.46 paid on 10/27/14, plus \$90.00 paid on 1/15/15 and \$36.00 paid on 4/6/15 (total \$6,269.46). <u>Need clarification.</u> <u>SEE ADDITIONAL PAGE</u>
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	2620(c)		
✓	Order	Account period: 5/1/14 through 4/15/15 Accounting: \$450,282.79 Beginning POH: \$419,304.46 Ending POH: \$ 3,529.23 Trustee: \$3,952.21 (.75%, payable monthly) (\$3,360.28 has already been paid at \$329.35 per month. Petitioner requests payment of the balance of \$591.93.) Note: In addition to the trustee fees, broker fees of 1.5% are also paid to Merrill Lynch. Fees for this account period total \$3,633.97. Attorney: \$1,329.00 (for 5.1 attorney hours @ \$250/hr and 0.6 bookkeeper hours @ \$90/hr, itemized at Exhibit B. Note: Time includes 2.5 estimated hours for travel to Fresno, appearance at hearing, and return travel, as well as 0.4 hours estimated time for final charges to distribute residue and close out file.) Bond: Current bond is \$576,000.00. Petitioner requests exoneration upon proof of distribution. Petitioners pray for an Order: 1. Finding that all facts stated in the petition are true and that all notices required by law have been duly given; 2. Settling the Trustee's Supplemental Account and confirming and ratifying all acts and transactions set forth therein; 3. Allowing a fee of \$3,951.21 to the Trustee for services rendered through 4/15/15 and authorizing the Trustee to receive \$591.93 as the balance of their fee not yet paid; 4. Authorizing the Trustee to pay its attorney from trust funds the sum of \$1,329.00 for attorney's fees for services rendered through the hearing of this petition and for filing proofs of distribution and exoneration of the Trustee's bond; 5. For an order discharging the Trustee and exonerating its bond upon filing proof that the sums remaining in the Trust have been distributed to the Beneficiary; and 6. For such other further relief as the court deems just.	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Page 2

NEEDS/PROBLEMS/COMMENTS (Cont'd):

- 3. Attorney fee request includes .6 hours @ \$90/hr for the attorney's bookkeeper. The Court may require authority pursuant to Probate Code §2640(c), which appears to allow legal services for attorney and paralegal only, and Local Rule 7.17.B.4, which disallows clerical services as a cost of doing business.**
- 4. The Court may require clarification regarding the estimated time included in the attorney fees. Note: Travel time to and from court is considered a cost of doing business and not reimbursable. The Court may require some reduction.**
- 5. If the petition is granted as prayed, order should reflect distribution of the remaining dollar amount to the beneficiary. Local Rule 7.6.1.A.**

Age: 4	BRIANNA CUTTING , mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: a. Nathan Williams (father) b. Park Williams (paternal grandfather) c. Karen Williams (paternal grandmother) d. David Hornor (maternal grandfather)
	SHARRON HORNOR , maternal grandmother, was appointed guardian on 05/24/13. – <i>Personally served on 05/06/15</i>	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Father: NATHAN WILLIAMS	
<input checked="" type="checkbox"/> Verified	Paternal grandfather: PARK WILLIAMS Paternal grandmother: KAREN WILLIAMS	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Maternal grandfather: DAVID HORNOR	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner requests that the guardianship be terminated [no reason given].	
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/> x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.	Court Investigator Jennifer Young filed a report on 06/01/15.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 06/03/15
		Updates:
		Recommendation:
		File 2 - Horner

3A Amayah Garza, Genaro Montes, III, and Ayden Garza (GUARD/P)

Case No. 13CEPR00558

Atty Huitron, Claudia (Pro Per – Maternal Grandmother – Guardian of Amayah and Genaro)

Atty Garza, Priscilla (Pro Per – Mother)

Status Re: Evaluation of the Minor

		CLAUDIA HUITRON , Maternal Grandmother, was appointed Guardian of minors Amayah (4) and Genaro (2) on 10-10-13, and filed a petition for guardianship of minor Ayden (6 months) on 12-10-14.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> This status hearing pertains to minor Ayden (6 months) only. <u>Minute Order 4-27-15:</u> Ms. Garza has a new letter regarding Ayden's evaluation that needs to be filed and properly served. <u>Note:</u> Nothing further has been filed since the last hearing.
C Ont from 033015, 042715			
Aff.Sub.Wit.		Mother: PRISCILLA GARZA Father: JACOB RODRIGUEZ	
Verified			
Inventory		On 2-2-15, the Court denied the petition for guardianship of Ayden and set this status hearing regarding evaluation of the minor.	
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: skc
Reviewed on: 6-2-15
Updates:
Recommendation:
File 3A – Garza & Montes

3A

3B Amayah Garza, Genaro Montes, Ill, and Ayden Garza (GUARD/P)

Case No. 13CEPR00558

Atty Huitron, Claudia (Pro Per – Maternal Grandmother – Guardian of Amayah and Genaro)

Atty Garza, Priscilla (Pro Per – Mother)

Status Re: Visitation

		CLAUDIA HUITRON , Maternal Grandmother, was appointed Guardian of minors Amayah and Genaro on 10-10-13.	NEEDS/PROBLEMS/COMMENTS: Note: This status hearing re: visitation pertains to minors Amayah and Genaro only. Minute Order 4-27-15: Continued due to a late-filed document by Ms. Huitron that has not been properly served.
		PRISCILLA GARZA , Mother, filed a petition for termination of guardianship on 12-1-14.	
Cont from 033015, 042715		Father: GENARO MONTES, JR.	
Aff.Sub.Wit.		On 2-2-15, the Court denied the petition and ordered visitation for Priscilla Garza (mother) and Genaro Montes, Jr. (father of Amayah and Genaro) every Saturday from 12pm - 2pm at Chuck E. Cheese, to be supervised by Cassandra Garza.	
Verified		The Court set this status hearing regarding the visitation.	
Inventory		Anita Mosqueda, paternal grandmother of Amayah and Genaro, filed a declaration on 3-27-15. Ms. Mosqueda states she believes her grandkids would be in a wonderful, loving, and safe environment living with their parents and they always want to come home with them. She understands the situation, but wants to voice to the courts that she truly believes they should be at home with their parents. She feels that if not, the visits should be longer and at the house, possibly weekend visits.	
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt		Declaration of Claudia Huitron filed 4-24-15 states parents are never on time to visits, visit schedule changed from Sat. to Sun. due to mother's employment, employment not verified. Attached are letters from Ernesto Rojas of EPU and JR Correa of Red Dragon Martial Arts.	Reviewed by: skc
UCCJEA			Reviewed on: 6-2-15
Citation			Updates: 6-3-15
FTB Notice		Priscilla Garza and Genaro Montes, Jr., filed declarations on 6-3-15. See Page 2.	Recommendation:
			File 3B – Garza & Montes

3B

3B Amayah Garza, Genaro Montes, III, and Ayden Garza (GUARD/P)

Page 2

Declarations of Priscilla Garza filed 6-3-15 states she is requesting unsupervised visits and for the visits to be longer. She has been getting so much closer to her kids and it's getting better every time they see each other. Sometimes her daughter asks to stay with them and to spend the night, but she does not know how to respond to her questions. She is patient and hopes that maybe soon she can. She would like to be more involved in their school activities and things like that, and would like to be notified when they are sick or at the hospital or when something is going on with them. She is a concerned parent that misses her children and wants to help. Ms. Garza states she noticed that all of the children were graduating so she texted her mom and asked if her daughter was graduating. She replied on 5-28-15 that she was graduating from preschool and offered to switch her 2-hour weekly visit to the graduation day. Ms. Garza thought she should be able to attend both the visitation and the graduation. She feels like she is entitled to go to things like that for her kids. Attached are screenshots of the text messages.

Declaration of Genaro Montes, III filed 6-3-15 states he is requesting unsupervised visits and overnight weekends. The kids really miss them and want to come home with them every time they see them. He is currently searching for work and the mother is already employed. He feels their household is stable and safe for the children to have overnight weekend visits to enjoy some quality time.

Petitioner: Darlene Tomiko Kawano (pro per)

Petition for Letters of Administration; Authorization to Administer Under IAEA with Limited Authority (Prob. C. 8002, 10450)

DOD: 10/12/07		DARLENE TOMIKO KAWANO, DAVID MASUMI KAWANO, INEZ SANAYA KAWANO and MARVIN KINJI KAWANO are petitioners and request appointment of DARLENE TOMIKO KAWANO as Administrator without bond. All heirs waive bond. Limited IAEA – o.k. Decedent died intestate. Residence: Fowler Publication: Fresno Business Journal <u>Estimated value of the estate:</u> Annual Income - \$ 9,000.00 Real property - \$375,000.00 Total - \$384,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> Wednesday, November 18, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, August 24, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.	
Cont. from 042715				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: KT Reviewed on: 6/3/15 Updates: Recommendation: File 15 - Kawano				

Attorney Winter, Gary (for Velia Juarez, Velia – Daughter – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 12/28/14		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>Amended petition filed 6/1/15 is set for hearing on 7/7/15.</p>	
Cont from 050415, 051815			
✓	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		W
✓	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 6/2/15	
		Updates: 5/13/15	
		Recommendation:	
		File 16 - Juarez	

Petition for Appointment of Temporary Guardian of the Person

Age: 16		<u>GENERAL HEARING: 07/13/15</u>	NEEDS/PROBLEMS/COMMENTS:
		CASSANDRA REAL , non-relative (brother's girlfriend), is Petitioner.	<u>CONTINUED FROM 06/01/15</u>
		Current Guardian: DOLORES PEREZ – personally served on 05/21/15	Minute Order from 06/01/15 states:
Cont. from 060815		Father: PEDRO GARCIA - deceased	Matter is continued so that the current guardian, Dolores Perez, can make a telephonic appearance.
<input type="checkbox"/>	Aff.Sub.Wit.	Mother: RUBY ZERMENO – personally served on 05/21/15	Notes: Petitioner has also filed a Petition for Termination of Guardianship that is set for hearing on 07/13/15.
<input checked="" type="checkbox"/>	Verified	Paternal grandparents: NOT LISTED	Dolores Perez, maternal aunt, was appointed as Guardian on 11/01/12. Letter from Ms. Perez attached to general guardianship petition supports Cassandra Real's petition.
<input type="checkbox"/>	Inventory	Maternal grandfather: RUBEN CORRALES – deceased	Tony Corrales, brother, is a co-petitioner on the general guardianship petition, but not the temporary petition.
<input type="checkbox"/>	PTC	Maternal grandmother: YVONNE RIOS	
<input type="checkbox"/>	Not.Cred.	Sibling: TONY CORRALES	
<input type="checkbox"/>	Notice of Hrg	Petitioner states [see Petition for details].	
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 06/03/15
			Updates:
			Recommendation:
			File 26 - Garcia